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ACCELERATING ENTREPRENEURIAL SUCCESS PODCAST

EPISODE **160**

Carl Sheeler

Show Notes at: *http://www.aesnation.com/160*

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Dear Fellow Entrepreneur,

We are thrilled that you have joined us here at AES Nation, where we're dedicated to accelerating entrepreneurial success—your success.

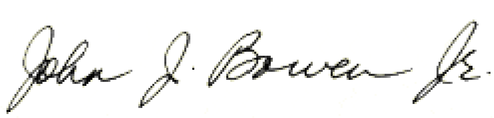
We hope you find this transcript to be a valuable supplement to the podcast and encourage you to share it with like-minded entrepreneurs in your network.

In addition to our five-times-a-week interviews with leading entrepreneurs, keep in mind that we have plenty of other resources to help put your success on the fast track:

- Our **monthly live, interactive webinars** co-hosted with Dan Sullivan of Strategic Coach feature today's top entrepreneurs. These are world-changing entrepreneurs who have the insight to help transform your business.
- Our **virtual conferences** showcase business leaders and experts in elevating your success and your life. These one-day online events give you access to the in-depth presentations and interaction that you'd get at a live conference from the comfort of your office or home.
- The **AESNation.com weekly newsletter** will always keep you on top of the latest interviews and events. [Sign up here.]

Thanks for being part of the AES Nation community. We'll see you online.

Best of success,



John Bowen
Co-founder, AES Nation

John Bowen: As entrepreneurs we want to make a huge difference. We want to deliver tremendous value to our clients and all those future clients, but at the same time what we want to do in our enlightened self-interest is to create tremendous value. Well I have a remarkable expert that knows all about creating value from both sides of the equation today. He is a unique individual in that, first of all he's recognized worldwide as a thought leader, most recently from the merger and acquisition alliance. He's a number 1 thought leader this last year. In addition, though, and this is a part that should scare you a bit, half of his work is working on with business, particularly family owned business, in arbitration and litigation on the challenges of that creating value.

Okay, unbelievable lessons over there, but why I wanted to have him with you today is the other half. The half where he's helping businesses really, realize their full potential. That's what we have here at AES Nation, it's all about accelerating your success. I'm John Bowen, you are at AES Nation, stay tuned, you want to [inaudible 00:01:22] and learn these lessons so you can apply to create tremendous value. Stay tuned.

John: Carl thank you for joining us. You have such ... I'll only give a couple bullets of your introduction. I was joking before we turned on the recording that I printed out your CV and it's over 10 pages, just because you've been making a difference out there. What I'd love to do is to, before we go into some of the lessons learned, that our peers, our successful for entrepreneurs can execute so that they can create the value and learn from the lessons that you have. Give us a little background, because I don't want to say you have a checkered past but you've done a lot of stuff here, and really you occupy a very unusual as this strategy architect to helping businesses. There are very few people that are qualified. There's a lot of people, you and I know, that raise their hand and say they are. How did you get to where you are today?

Carl Sheeler: I would say the operative is risk and opportunity, maybe that's operative 2 words. Risk, a good way to look at it is the more you can identify, measure, manage and mitigate risk, the lower the risk, the higher the price multiple. That's the end game. We tend to be taught that you look at the top line, the revenues, the bottom line, being the profits, and that's what you drive motivation. But that's an over simplicity as to what drives value. Risk and opportunity is what drives value.

John: Carl, I want to go to a little over the qualifications because you've got unusual academic, real world experience, and then the privilege, earned privilege of working with so many successful entrepreneurs, particularly family owned businesses that you've made a huge difference. I'm not talking about a little here, a little there, but many, many millions of dollars, and really aggregately I'm sure billions of dollars. How did you gain that expertise? I'm going to talk about your book later. I've read your book; you've got a lot of depth there.

Carl: One would say that it actually started as an entrepreneur between the age of 9 and 12. I lived in Brooklyn New York and I delivered fruits and vegetables. Each delivery was 25 cents, the tips were between 25 and 50 cents, so for the 2-hour period between 3:00 and 5:00, I could pull down $2 to $4, which as a kid in the late 60s and early 70s, that's not too bad bread and butter for that age. That kind of tapped into the entrepreneurial bite that got me going forward.

I did serve in the military. That military service in the Marines kind of taught to sift out the minutia from the relevant and stay focused. That passion that most entrepreneurs have is, how do you tap into that passion and still remain focused? Then fast forward after doing a lot of strategic work in the Marine Corp at various levels, I ended joining a organization that most people are familiar with, the American Automobile Association, the national headquarters, and doing operational audits. The best way to think about operational audits is if you went it for a full medical examination that takes all day, this is an audit that takes all week and identifies both the strengths and weaknesses. Obviously when there's weaknesses you try to repair them.

It's more than just finance, it's operations and strategy. Recognizing that business are just 4 walls, it's made of the human beings and the organization. Then fast forward after that, financial analyst for a multidisciplinary appraisal firm, that got me involved in all forms of appraisal, real estate appraisal, machinery and equipment, and obviously businesses. I was able to have a couple of success early on, received several large federal contracts for appraisal work, actually invested in several other businesses as a by-product. I've been serial entrepreneur in my own right. I've had 4 liquidity events to date. The most recent one is I actually merged my boutique national practice with a global valuation and litigation and advisory services firm, Berkeley Research Group.

John: That's great. Throughout you career, it's always been focused on focus, that strategic value creation. You used the term 'strategic value architect' and I think it fits really well. I want to go to some of the key takeaways that you've had over this career that are going to help the entrepreneurs that we have the privilege of joining us on the video podcast or on the audio side. One, as we were getting prepared for this, it really hit me the first one we were talking is growth versus gratification. Tell me a little bit about how that comes to play with an entrepreneur.

Carl: As you most entrepreneurs have the passion, they certainly want to persist but at some point they want to receive some of the fruits of their labor. Unfortunately, often times they do that a little bit too soon, and that's starts a pattern sometimes referred to as lifestyle business. It causes a lot of business owners to cap at between $5 and $10 million in either revenues or value, but many of them want to get to $25 million, $50 million, $100 million. What's the difference between those 2 entrepreneurs?

One of them tends to be very focused on building value and the other one is focused on what kind of profits can I generate this year so that I can expand my lifestyle? Starting the beast is what I usually refer to it as. If you look, from the standpoint as an investor, would you want to invest in a company that's publicly traded that doesn't reinvest in the company's growth? Most people say, "Of course not, because I get most of my return on capital appreciation or growth." Why would you do that in your primary asset? There's got to be a good balance between reinvestment back in the business, and when I say reinvestment I don't mean just financial capital, I also mean human capital and we'll talk about that later.

John: Yeah. Carl let's go a little deeper on this, on the trade-offs. Because I've had both business, I call them lifestyle boutiques and they're great. You can make a really good income, particularly in professional services, but you can it in manufacturing, you can have any of these where you've got a business that's chugging along, and then there's the other businesses. I've built and gotten full cycle on a number of businesses, where we really invested. Particularly there was some delayed gratification by the partners and the families and so on. In some cases, there was a pretty payday because of that. How do you help an entrepreneur see the trade-offs between the 2 areas?

Carl: It's actually a pretty good question. What we'll do first is we'll start with the benchmark, where are you at right now and why? Now if that's an issue of preference, and we usually distill it down to liquidity, legacy, leverage and learning, where are they on that life cycle of the business? Does this suit them? If this is what they want, then quite frankly there isn't much of an issue, other than perhaps one of those 4 Ls that I mentioned previously. There's always a benchmark that you start off with. That benchmark allows you to identify the low lying fruit to what you could be doing differently to work on the business, as opposed to in the business, worth blocking and tackling.

What we'll do is we'll demonstrate what would happen in 20 years, assuming that this is maybe you're in the first 5 years, or maybe you're in your last 5 years. What would happen if you changed certain levers the way that you operate your business? Maybe you have one business that says, "Look, I've never really liked using debt as part of the capital stack," and we indicate that perhaps because you're a manufacturer you could produce twice the widgets in half the time, which would lower your labor cost. Your waste as far as inventory would go down because every time the equipment stops because of a problem with the performance of the equipment your repair and maintenance expense would drop.

Even after the interest expense, which of course after taxes drops down to almost free cash because of the current interest rate, what we show is that you might have a business that within a year and half could be $75 million as opposed to $25 million. How sexy is that to you? Most people say, "It's pretty sexy, what do I have to do in order to do that," hence that brings us back to the strategic value architect. We find out whether they have the people in place to help them get from here to there. Whether we need to align those individuals because they're comfortable with them as far as their talents, or whether that we need to bring in outside people that those people are comfortable with, or whether we dropship some of our own staff in that organization. It starts with the fundamental question of, am I happy at $10 million, $25 million, or do I see myself as part of a future liquidity where I want it to be a high 8 or even 9 figure type sale.

John: Yeah. Having gone through that myself, the difference I valuation that that creates, and we all know, one of the things as entrepreneurs is we want to grow our businesses, but we also want to really maximize our personal wealth so we have all the options. No matter what we want to do, and boy switching that little switch ... My experience is you don't have to screw up your life. I think that's one of the things that entrepreneurs worry about is, "I've got this great lifestyle business, if I try scaling up boy I'm putting everything at risk. The amount of management and issues and so on ... " That really leads us to the next area that we talked about, it's how important human capital is, the ecosystem to make this transition. Maybe, Carl what do you see in there?

Carl: It's a great question John. Bottom line is this, the real differentiation between any business is the people that you have internally to the organization, and the people that you work with, whether they're the vendors, whether they're the clients, whether they're the advisors. That team, back to the old saying, "It takes a village," cannot be under emphasised, or rather over emphasised. The question then becomes is, "What kind of relationships do you have? Are these ones that they're offering uncommon knowledge or stuff that if you went on the internet you could find the answers to a lot of those questions?"

If you're measuring your relationships based on hourly rate and commissions and interest rates, then that may cause you to examine, "Are these the type of people that will help me get from here to there?" That usually starts with the type of questions, "Here's where I'm at, here's where I want to go, what can you do for me as fill-in an advisor here?" The attorney, the accountant, the insurance professional, the wealth advisor, the commercial banker, even the investment banker. I can go on and on as far as the various individuals, but when you first see what your price multiple is, that's why I said the benchmark.

Let's say your price multiple is 5X and you realize that if you're to do X, Y and Z, which you could not do alone, you have your full time job of blocking and tackling. You're either going to have to have somebody internal to your organization, or external, act as the steward to the growth of that business. They're going to understand that the metrics are risk driven, so obviously that allows you to manage that risk so that you're not putting what you've already established at risk. There's a difference between the risk to the asset and the risk within the asset. We make that differentiation, how to build that value, by minimizing that risk not adding risk to it. That's always done with those trusted advisors and even the vendors. May I give an example?

An example would be back to that metal fabrication business. You might look at your vendor as the raw material supplier, they give you the metals, you then fabricate whatever that finished product is. Do you talk to your vendor about what are some of the best practices that some of my competitors are doing in their businesses? Not that they're going to give the name of that specific business, but they may actually suggest they're using just-in-time management, and as a result of that the amount of inventory that they carry is much less, which would improve cash flow. I may not have not about, I don't what I don't know. Here's free advice that could actually change my cash flow so that I'm not using lines of credit when my flows goes down. Just a very simplistic example but there are literally dozens of those and they're all free.

John: Carl I'm a big believer in this. When we work I choose vendors based on that because, and I don't call them vendors anymore I call them strategic partners, because that ability to share insights. I'm thinking about a conversation I had the other day with a CEO, where my project managers were struggling with an issue. It's a very large organization, he's got tremendous experience there running all these events, and we wanted to create this very large event and we were struggling on some of the issues. In a 45-minute phone call with him that we taped, recorded with his permission obviously, the insights I got there were worth probably $100,000 easily. I could have paid a consultant probably $200,000 to get that $100,000 of value, sometimes you get the wrong one.

Part of, Carl, one of the things I see over and over again, how important that team is. Particularly if you do decide to scale up, it's critical because none of us get there by ourselves. We've got to have a team and it's not just doing their job whether it's internal or external, it's that passion of working with fellow entrepreneurs that are creating a bigger pie for all in their enlightened self-interest. Carl, how do you pick the right people? Because boy, it's not only do you not get the lift you have the wrong person, often times you get a haircut. You get the person; it can cause amazing damage.

Carl: It's actually a good question, and the way that I usually pose that to a family or a founder is, what are you top 3 priorities? If they can't consolidate it to 3, I know that there's an issue of dilution. Then the second question is, is this known to the advisors and your clients, your vendors, your key staff? If the answer is no, you already know that you have a gap right there. Here's again a simplistic example. You have a commercial banker, when you were working out of your garage the local bank was fine, but now you actually have some foreign clients and you've scaled up to a business that maybe is doing $20 million in annual sales.

That local bank maybe you have a nice relationship with, but are they the right fit to help you scale? It may be time for [Comerica 00:19:05], Bank of America, Wells Fargo, you take your pick, but then you look at than banker, are they talking in terms of rates and terms, are they talking in, "Let's take a look at what you're doing, we have data that will let you know what your asset allocation within the business ought to be that your accounts receivable are out of whack. They may ask you about who your accountant because they're taking a look at tax returns and it looks like it's more of the cash basis reporting, not really anything more than reporting the news, not helping to make the news. That starts to become very organic and holistic. Usually it starts with that conversation and you start to identify who's on board and whether somebody is more concerned about protecting their turf and their relationship, as opposed to allowing you to expand the value of your relationship.

John: Carl, I want to tell, as you're listening to this I want each of us to assess each of our vendors, our relationships, internally and externally because this is something I've done consciously. I didn't do it early in my career, if they delivered a good widget I was buying, that was fine. Now if they're a strategic partner, they're not helping, a fellow entrepreneur looking to make the pie bigger in their own enlightened self-interest because, not only the value of the relationship, I'm not going to leave them for a penny on the widget difference, or the hourly rate or whatever it is, but they're creating a more successful partner.

I'll tell you, this is one of the thing that I was going back to that growth versus gratification because this what makes growing a business a lot of fun. You've got these great people that you're hanging out with, that you have the privilege of hanging out. We're all looking to create more value for the end user no matter what we're doing. That's what I love about business, but Carl, one of the challenges in all of this, and you talk about it, humility versus hubris. When you brought it up before we turned on the camera I mentioned that I had one more than the other at 35, I recently turned 60. It's amazing how confident you can be. The problem with having success as an entrepreneur is you can get easily surrounded by the wrong people, start believing your stuff and set yourself off for a big fall. How do we deal with this challenge?

Carl: One way to look at it is, first of all it's not unique. Part of what we have is a sense of both fear and elation. We don't want to have a failure, but at the same time we want to take advantage of opportunities. One way to look at this is that, are you the smartest in the room? Because if that's the way that you're thinking, that could be problematic in of itself. It may say something about your need for control. Another question that should come to mind, [inaudible 00:22:21] you are not alone, is that everybody's heard about merger and acquisitions, and synergies, and strategic acquisitions. But no one talks about the majority of them fail.

What I mean by fail is they don't achieve the accretion, the additional value that was hoped for. These are what would say are the 2 smartest guys in the room, the guy that's negotiating the deal and the guy that's cutting the check. The question then becomes, is if this is representative any percent of the time, that that value doesn't occur, it might be worthwhile to examine, are you doing this from the guts, or are you doing this from a little bit more of a removed process. Not that you should get rid of your passion, but at some point as you're introducing more of a professional approach to scaling the business, trust becomes very, very important.

You have to start to acknowledge of what you don't know, because what will be shown, and I do this in my book which you know about, is that when people make decisions, and decisions are very, very important of course, they make assumptions. If you took a look at all the assumptions that are made from the point that you're deciding that you're going to decide, to actually making the decision, you realize most of it's predicated on assumptions as opposed to fact, because facts are boring. That would be the difference between humility and hubris, know what you don't know and find the people that know what you need to know.

John: This is a part, once we recognize this Carl, you and I both agree, there's so much talent out there, and it's readily available today. It's amazing that we can access it but we have to take a step back and recognize that we're really not that smart. Most of us as entrepreneurs, we've had enough time that the market's beaten us down that we have a little bit of humility but it's very easy when our businesses are taking off, or scaling up, and things are working, to lose that. That's so dangerous, and that's why we've got to have the right team around us. Carl one of the things I want to go into too is you talk about this now versus 5 years out, the proactive versus reactive. This is so important; how can entrepreneurs make the right call here?

Carl: It's actually a good question. We're going to start back with that human capital again. Take a look at who your team is, take a look at whether most of the dealings that you have, are they tactical, are they transactional, are they technical, are they ad-hoc, are they reactive? If the answer is yes to most of those, you have no strategy. Strategy as in, I'm going to sell more next year. Strategy is what do I want this to look like so that we can clearly differentiate our value to anybody else that we're competing with. What you'll find when you take away all the noise and all the mission statements, is the people that you have that's different in your organization than the organizations that you're competing with, whether you're a one-man shop or whether you're a thousand-man organization.

John: Yeah, that's so great. I want to go to the next segment because you bring this all together in what I call the book of the day. Carl you have written a great book. I will put it up on the screen here for those of you who are watching on video, and if you're not remember the transcript, the show notes are all at AES Nation. It's Equity Value Enhancement, a tool to leverage human and financial capital while managing risk. Carl tell us a little bit about what's in the book and how entrepreneurs can use that to really maximize their value.

Carl: One way to look at it is I have this acronym that if you can remember that as the takeaway, it's Governance which include strategy, culture, innovation. It's the relationships that we talked about previously. It's the Risks and about a third to half of the book just talks about all these operational, financial and legal Risks that aren't just number driven, the last one is the Knowledge that we talked about before.

What the book does, even though I have an advance degree in finance, it emphasizes that the human capital must be leveraged in combination with the financial capital. Put another way, you can't throw money at issues and expect the result to happen on its own, very, very rare. The way that you leverage the result is that you tap into that village, that ecosystem of people and that talent, and you ask the question, what do I want this to look like in 5 years, or 3 years, or even 2 years, and then you reverse engineer what it is that you're doing right now that has to change. Otherwise you're going to default to the familiar.

What this does as a book is it takes you through those risks, examining advisory relationships, it tells the advisors the optics of risk through the lens of the owner, through the lens of other advisors. It talks about how to take all of this and go together. Here's the good news, I still count on my fingers, even when I'm dealing a million-dollar client. This is written truly for the layperson, not a valuation expert.

John: Let me put it up on the screen again so everybody has it, again go to the AES Nation. It's a great book. It is a little thick and very thoughtful. I was thinking after meeting you when I bought the book I'm going, "You know what? I'm going to go back to all my financial background and so on," the reality was it's a great read because the biggest value creation you talk about is the human capital. This is where I think so many of us as entrepreneurs get caught up. I'll disagree just for a second with you Carl that when you throw money at a problem you said it didn't change.

I have changed many things throwing money at it, unfortunately it hasn't always been positive changes. When you're thoughtful, you visualize where you want to drive it. Remember as leaders, as entrepreneurs, we have to inspire our team, both internally and externally, as well as our clients, to move forward. We have to have a vision then if we're going to inspire them too and build toward that and be thoughtful and use the strategic value, the architectural process that Carl's talking about. It's creates so much value it's amazing. Carl, let me go, the next segment is resources. What I'm looking for here is, let me put up your website.

Why don't you tell me a little bit about what's there, and then also why don't you bring up your charitable? Because one of the things that I think so often happens is we don't see the full person here, and as entrepreneurs we're artists. We're making a difference and you're making a difference not only with fellow entrepreneurs, your own businesses, your fellow entrepreneurs, but also... Let me put up your resource here, the website, it's a very easy one, carlsheeler.com, again the link will be on the show notes. Carl, what are you doing here?

Carl: If you go to the website, again we're trying to make it as simplistic as possible. You had referenced the Equity Value Enhancement as a book, really if you would go to the website, you could see some of the various white papers and the blogs that I've written. I recently wrote one for LinkedIn. Some of the past presentations that I've done, the PowerPoints, the podcasts. If Equity Value Enhancement holds interest we allow anybody that visits the site, and we do not solicit, the only thing that we need is the name and the email address and then we will send the first several chapters of the book complimentary. If you love it, we hope that you order the book. If you don't, I'm sorry to have disappointed.

In part back to the foundation, as I mentioned to you before I'm a combat veteran myself, being a tank officer in the Marine Corp, subsequently a staff officer. I'm very, very sensitive to the number of veterans that have served multiple deployments because we didn't have a draft. Many, many of them are confronted with combat post-traumatic stress disorder. We established a 501c3 that offers equine therapy at a ranch that they will learn through their interaction with a horse how to actually deal and confront with life. One other thing that we also try to attract entrepreneurs, successful entrepreneurs, to this because their own personal ... As you were talking about previously, entrepreneurs are outliers. They're not part of the herd.

Particularly if you're at that $5 or $10 million, you've already beat the odds. We tend to look at that as being not a big deal, it's a huge deal. You're the job creator, you had to go out of your comfort zone to go after a passion and success. But the question then becomes, if this is how I define myself, now what? Instead of hearing things like 'exit strategy,' would argue, what's your transition plan? That's to go to the next chapter in the book, not just to close the book. The ranch offers that as an opportunity, particularly families of great success that want to leave a legacy. We tie that in to not only the 501c3 but a separate opportunity for families of affluence.

John: That's great Carl. It's really impressive. This is one of the things I think that each of us an entrepreneurs, successful entrepreneurs, that we're ... I never liked the give back kind of connotation because I think as entrepreneurs we're delivering value all along and that's how we create value. But the next chapter in our professional career, those things, those passions that you have, the ability to create foundations as you build wealth. It's one of the big arguments for scaling up. Let me go to the last segment which is key takeaways. I've got to tell you Carl there's some great stuff I just want to go over one more time to make sure everybody got it.

Growth versus gratification, the big thing here there's nothing wrong with a lifestyle boutique. Carl mentioned, I think a statistic I was seeing, 4 out every ... To get to 5 million there's only 1 out of 400 entrepreneurs, or business owners that do that, 5 million or greater. No matter what level you are, you've accomplished some real success, but do you want to take it further and really build, I always liked the enterprise value, but also having that lifestyle along with it. But it does mean some deferral to make it happen. Also, Carl talked about the ecosystem and this is the value of human capital and really in his book, great book, on leveraging human capital. It's not just your team, it's not just your partners, it's just not the shareholders, it's everybody that you chose to work with.

There's so much value out there, and if they're not contributing beyond just that simple 40 hours or the vendor that's just delivering, you need to have better partners. Also, humility, boy this is something as entrepreneurs, it's easy when you're doing, particularly as a business is really scaling up, and if it's not burning and it's actually giving you a fair cash flow as well, it's amazing. You can start thinking you're really brilliant. You're not, okay? You're talented for sure, but what we want to do is really understand where we fit in this equation and the value that we can create to really rely on our teammates. Then the difference between being proactive and reactive, and that 5 years out vision, really we want to lead, we want to inspire.

In today's world we've got all these political things going on and no matter when you're listening to this, there's going to be political things going on, there's going to be uncertainty about the economy, there's going to be social challenges out there. With all that's going on, your clients are concerned, your teammates are concerned, you're concerned. You have to inspire to take action. Carl, this has been phenomenal. I want to encourage everybody to go to ASENation.com, you'll get the transcript. Spend some time there, go to the link to Carl's website. If you need a little proof download the beginning of the book but I've got to tell you, just go buy the book. It is going to be the best $50, Kindle version's only $50, I forgot what the other, maybe $70 on Amazon. It is one of the highest return on investments you're going to ever get. Let's go out and make a difference. Your clients, your future clients, all those teammates, that human capital that wants to help you be even more successful, they're for you. Wish you the best of success.

A Second Opinion on Your Finances

A Complimentary Service from Financial Advisor Select for the Members of AES Nation

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Best of success,

John J. Bowen Jr.

John Bowen
Founder and CEO
Financial Advisor Select